Triline GRC

Version 3.1.0 New Features

December 2019

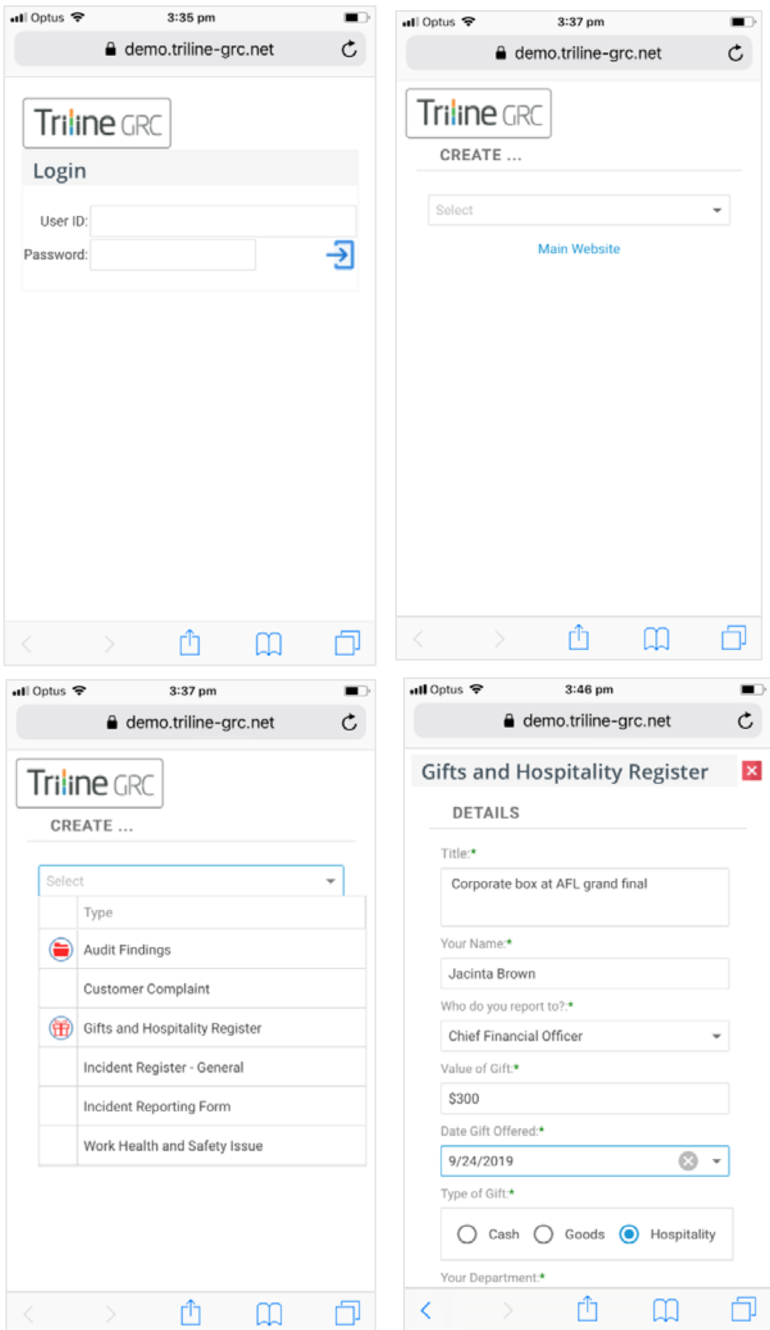
TriLine GRC V3.1.0 — New Features

Note: Some terminology may vary depending on your Configuration settings.

Interface

Mobile devices

We have developed a new interface for mobile devices. By default, you will be taken to the 'mobile' page where you can create Register and Event records. You can optionally go to the main site.



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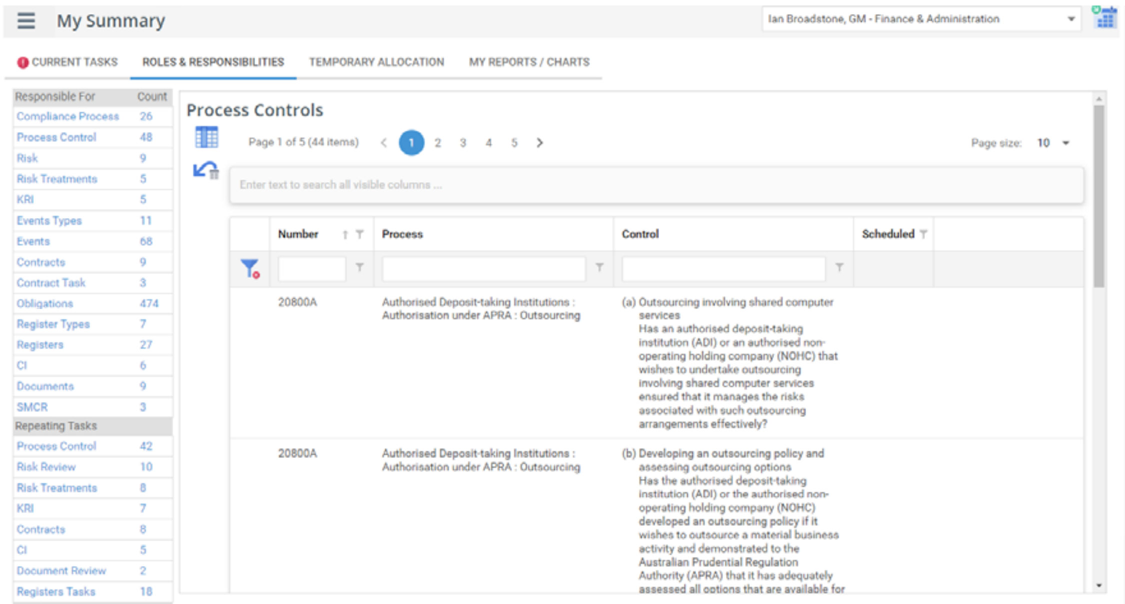
Page Logo

Clicking the page logo (top left corner of the screen) will return you to the My Summary page.

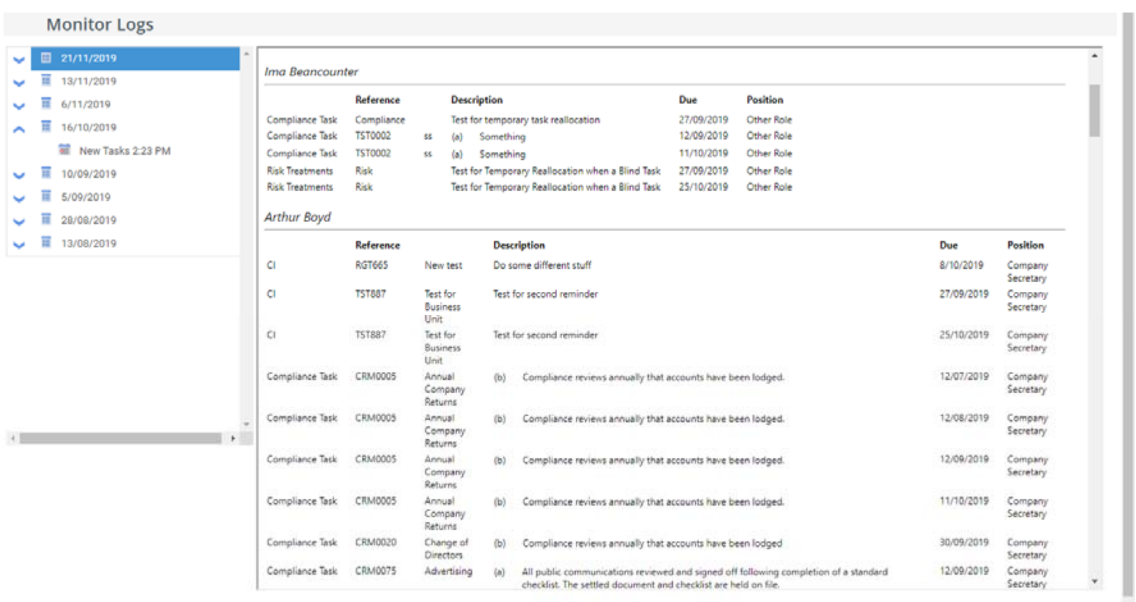
My Summary Roles & Responsibilities

The information displayed on the Roles & Responsibilities tab will now use all available screen space.



Monitor Logs and Web Monitor

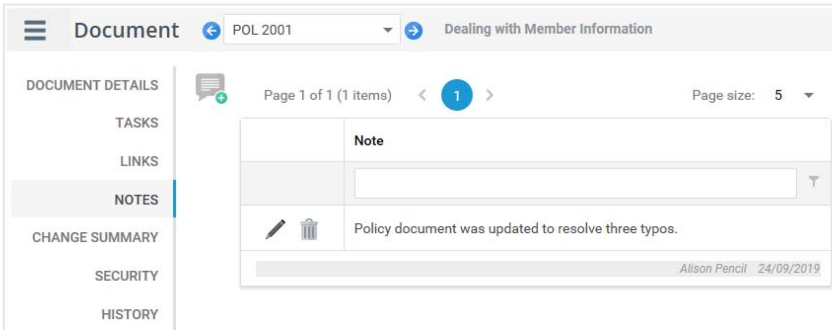
The Monitor Logs and Web Monitor pages will now use all available screen space.



Document Library

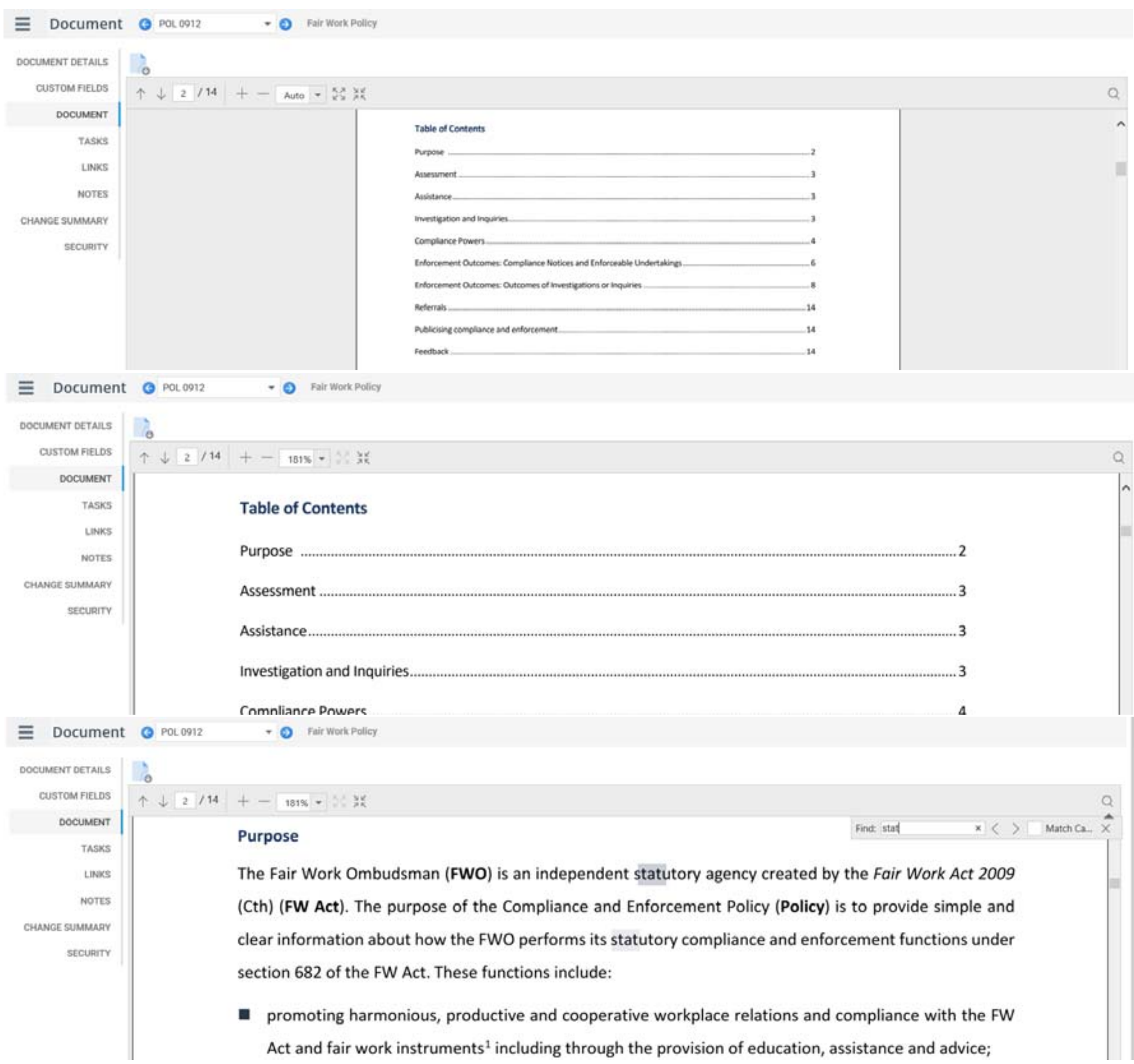
Notes

You can now add notes to a Document Library record.



PDF Viewer

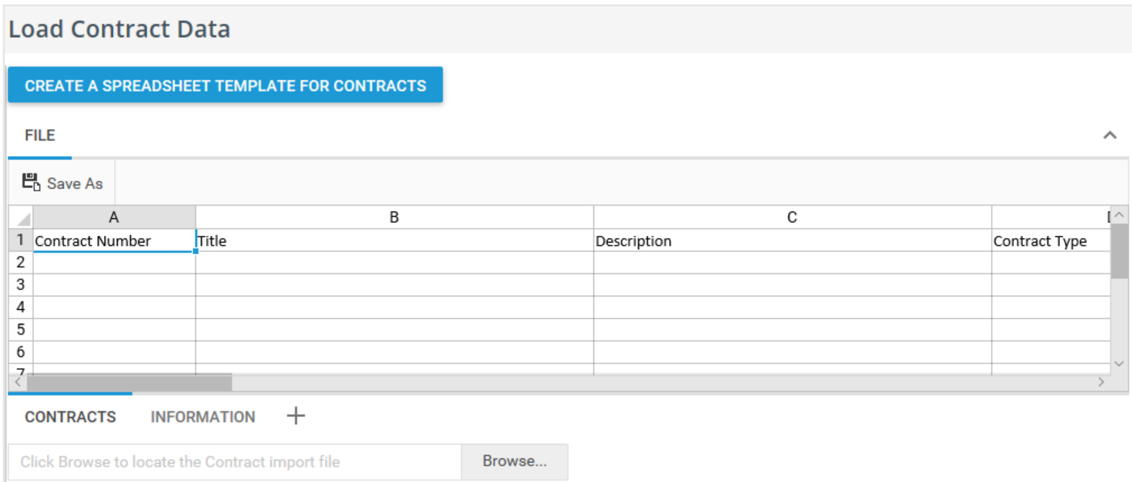
The PDF Viewer has been upgraded to provide better on-screen resolution and adds search and document size controls.

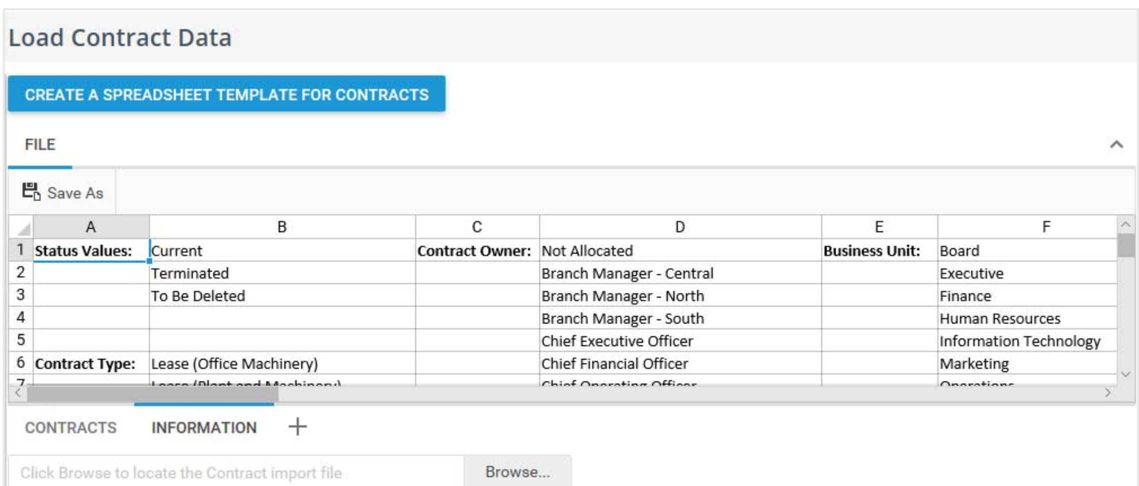


Contracts

Load Contract records via spreadsheet

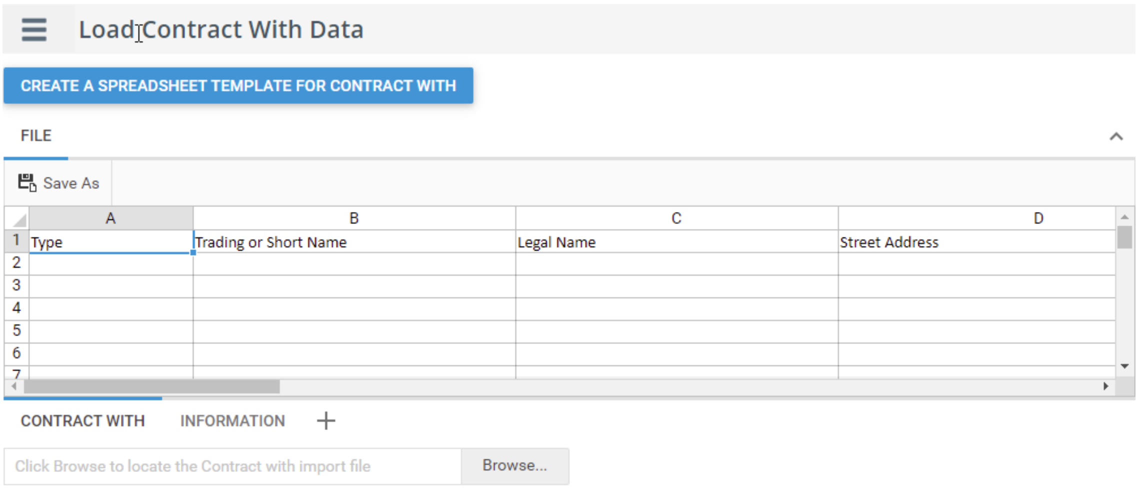
You can now create a template spreadsheet to import Contract records. The first tab contains the required fields while the second has information to assist in completion (e.g. the available Contract Types).

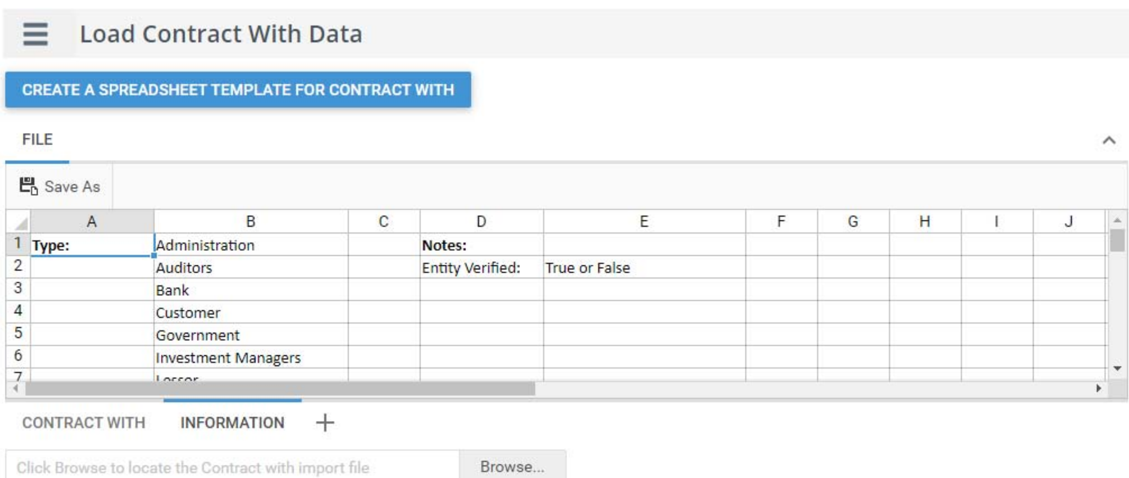




Load Contract With via spreadsheet

You can now create a spreadsheet to import Contract With records. The first tab contains the required fields while the second has information to assist in completion (e.g. the available Contract With Types).

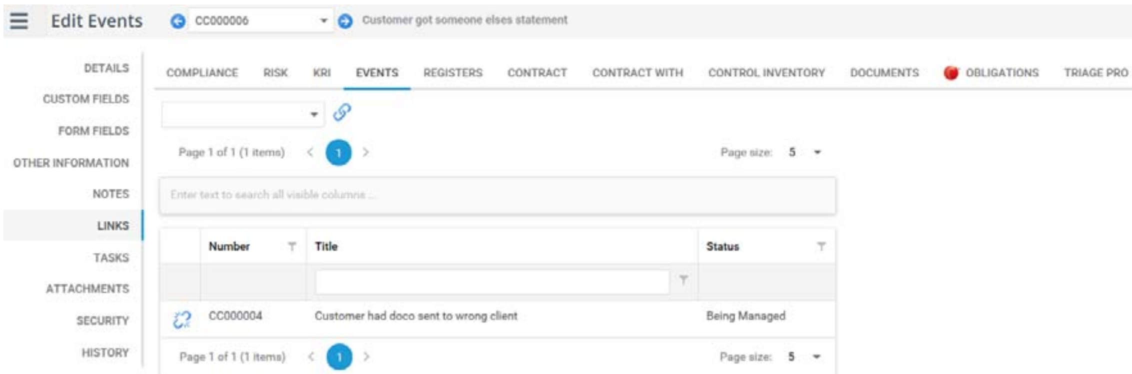




Events

Linking Events

It is now possible to link one Event to another (e.g. to link related or similar Event records).

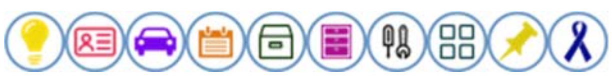


Event List

Linked attachments are now included in the Event List report.

Registers

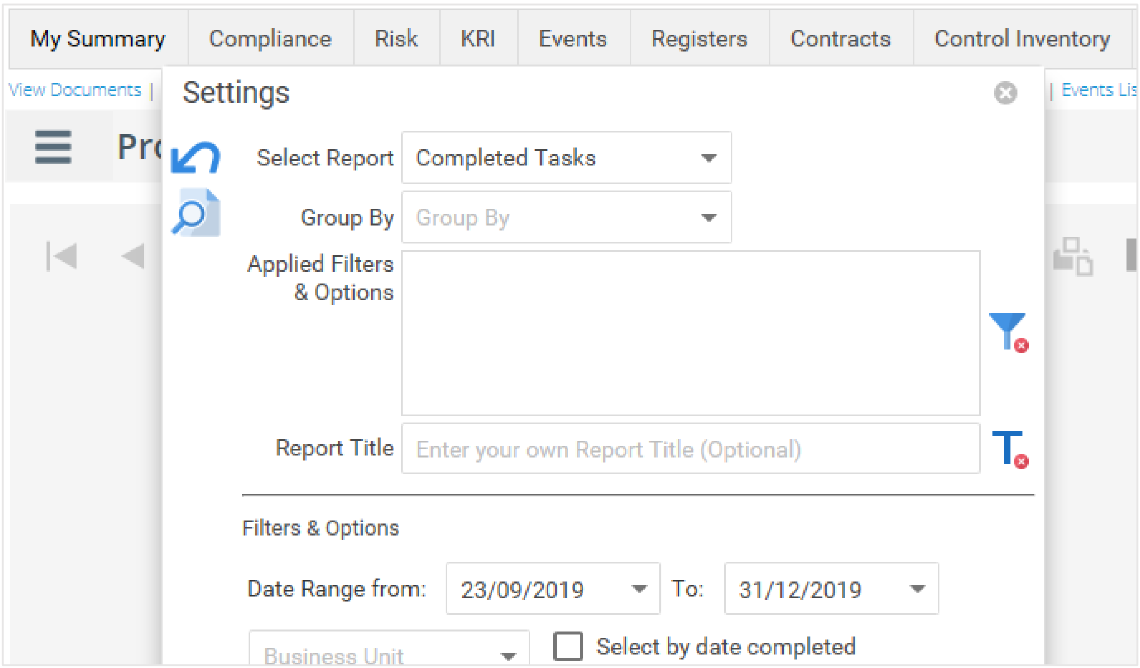
Ten new icons added for Register Types.



Reports

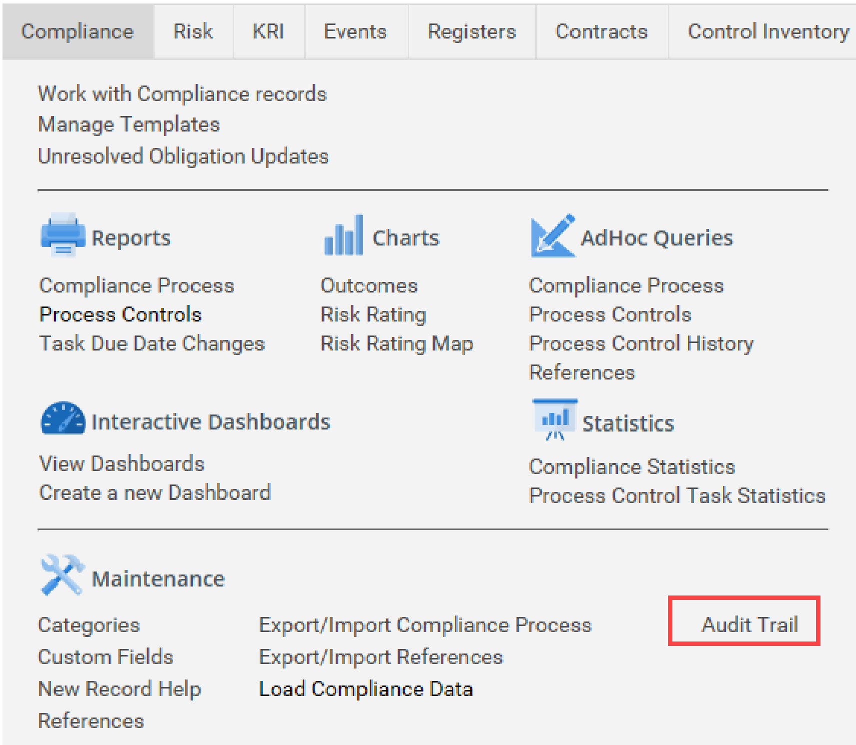
Completed Tasks

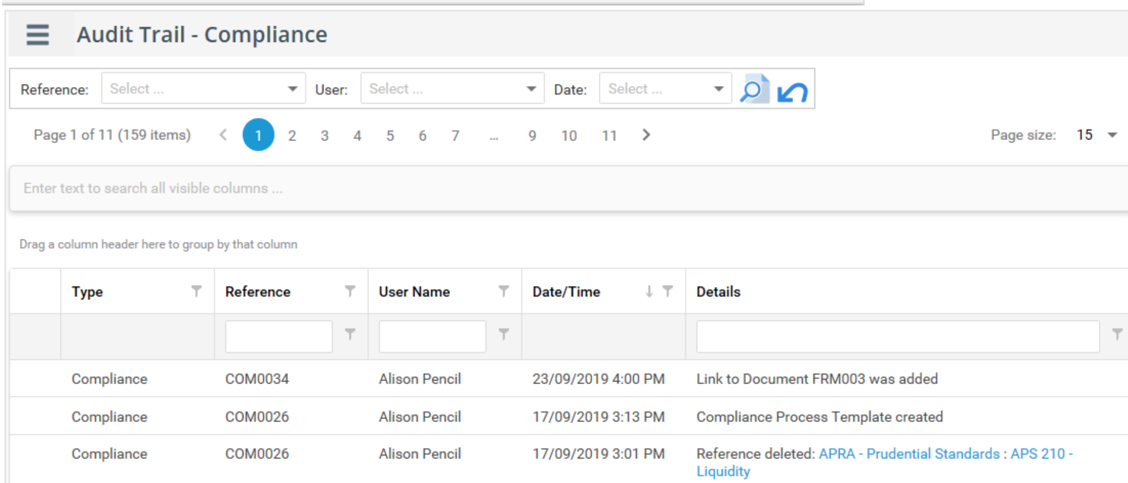
The current limitation on the 'To' date (maximum today's date) has been removed to allow for reports to include tasks already completed where the Due Date is in the future.



Maintenance

An Audit Trail menu item has been added to the Maintenance menu for each module. This will allow a Module Administrator to view the Audit Trail records for that module (previously only available to an Administrator).





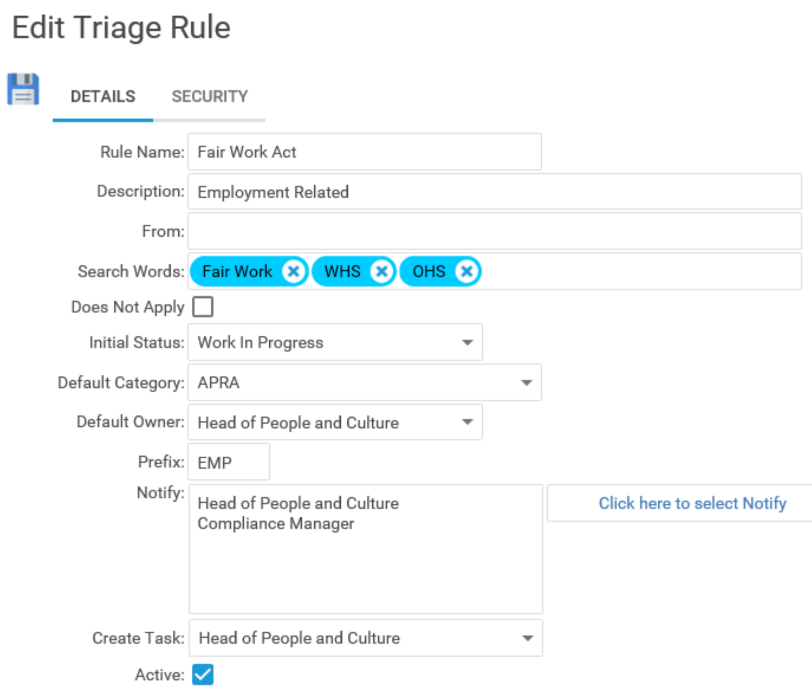
Triage PRO

Typically, notifications (normally via email) from regulators, accounting firms and others, end up in the email inbox of one or two people within your organisation. There is no corporate view of the information received. Your organisation is reliant on the recipient to view and process or disseminate the notification. When that person leaves the notifications are potentially lost or at best, hard to find. Searching through the notifications in your email client is cumbersome.

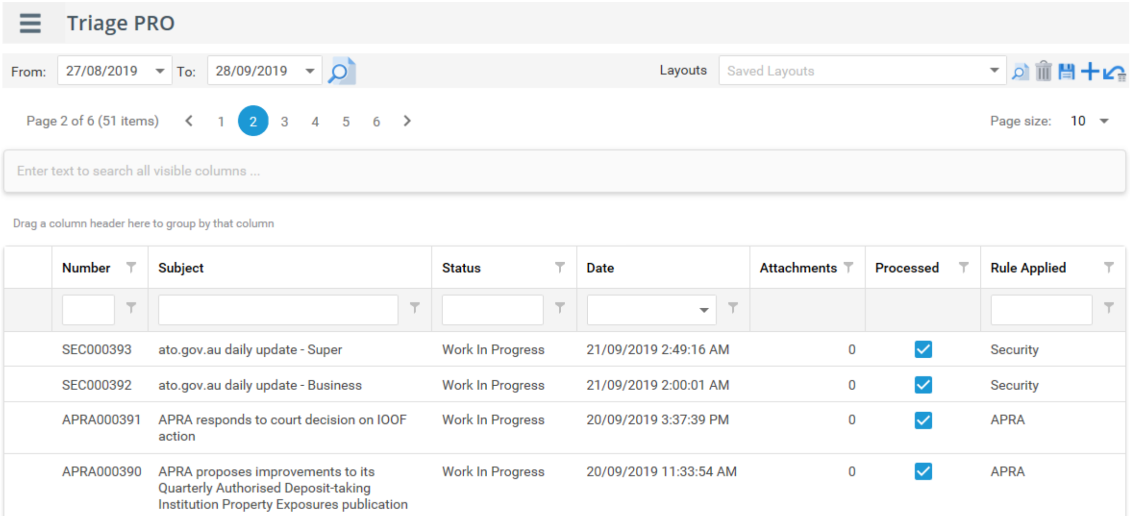
Enter Triage PRO.

Triage PRO is a new, optional module that will capture and process emails from any number of sources. The emails will be deposited in a central repository within TriLine GRC and they can be easily viewed by the appropriate people in the organisation.

You can define any number of 'rules' with key words/phrases. If the email matches the criteria the rule is applied. It can be categorised based on the rule. Any number of people can be advised that the email has arrived. A task can be generated to review and action (if required) the content of the email. Any attachments included in the email will be available for viewing.



Using TriLine GRC's powerful search functions it is a simple task to find specific items.


Triage PRO

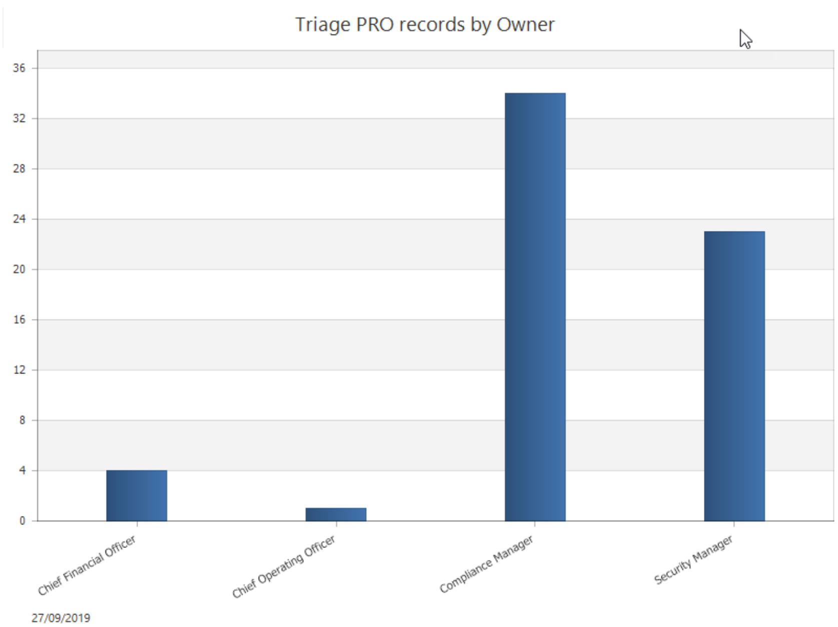
From: 27/08/2019 To: 28/09/2019 Layouts Saved Layouts

Page 2 of 6 (51 items) 1 2 3 4 5 6 Page size: 10

Enter text to search all visible columns ...

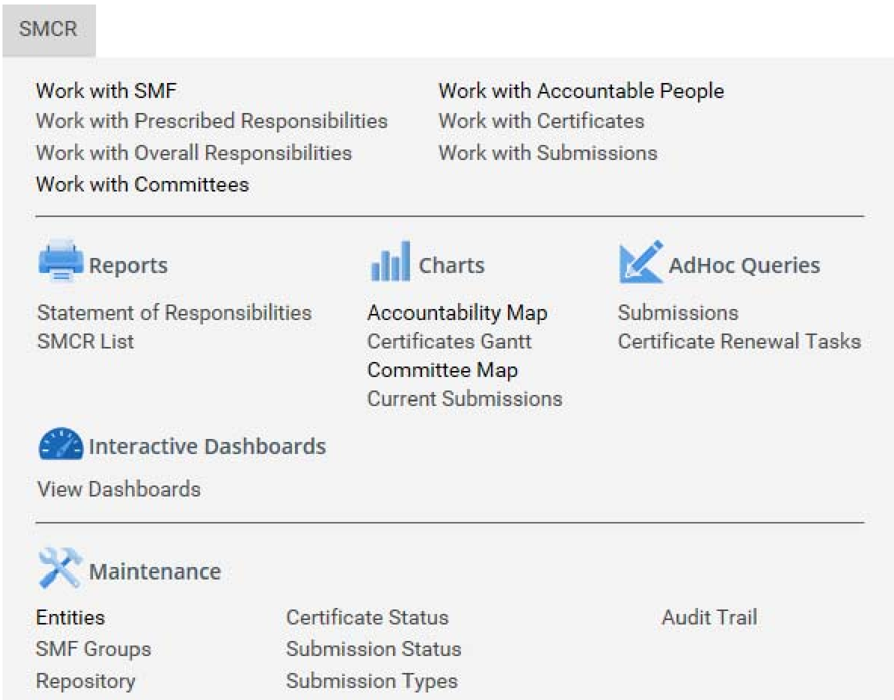
Drag a column header here to group by that column

Number	Subject	Status	Date	Attachments	Processed	Rule Applied
SEC000393	ato.gov.au daily update - Super	Work In Progress	21/09/2019 2:49:16 AM	0	✓	Security
SEC000392	ato.gov.au daily update - Business	Work In Progress	21/09/2019 2:00:01 AM	0	✓	Security
APRA000391	APRA responds to court decision on IOOF action	Work In Progress	20/09/2019 3:37:39 PM	0	✓	APRA
APRA000390	APRA proposes improvements to its Quarterly Authorised Deposit-taking Institution Property Exposures publication	Work In Progress	20/09/2019 11:33:54 AM	0	✓	APRA



SMCR

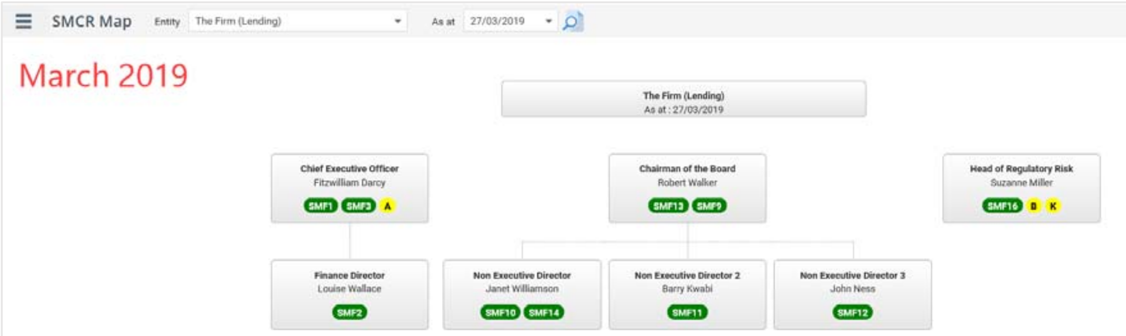
The TriLine GRC SMCR module provides the management tools required for the Senior Managers and Certification Regime.

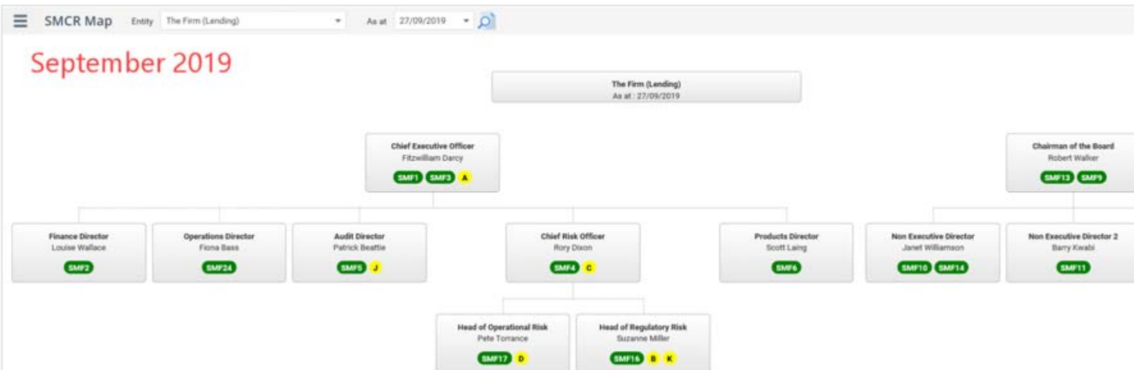


The features include:

- Multiple legal entities
- A map view of the Accountability within an entity
- Current and previous incumbents allocated to Functions and Responsibilities
- A map view of the committee structure within an entity
- Display a point-in-time view for both accountability and committee membership
- Current and previous committee members
- Record submissions to the regulator
- Manage certificates issued to staff
- Generate tasks to streamline the re-issue of certificates
- Fully integrated with other modules within TriLine GRC to provide not only what you need for reporting and audit, but also show how you are managing the requirements.

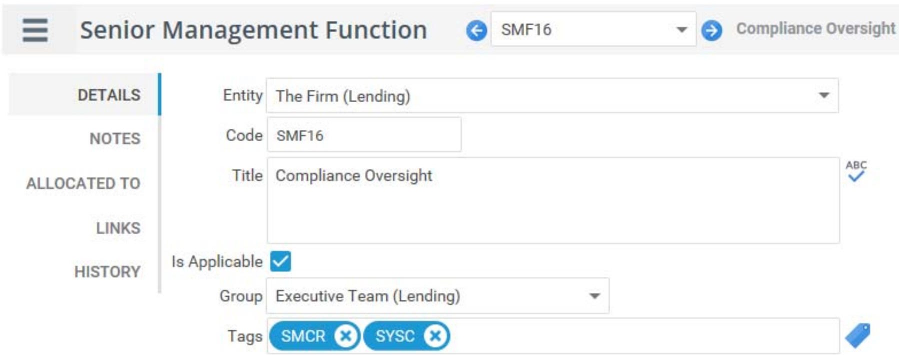
Point-in-time view

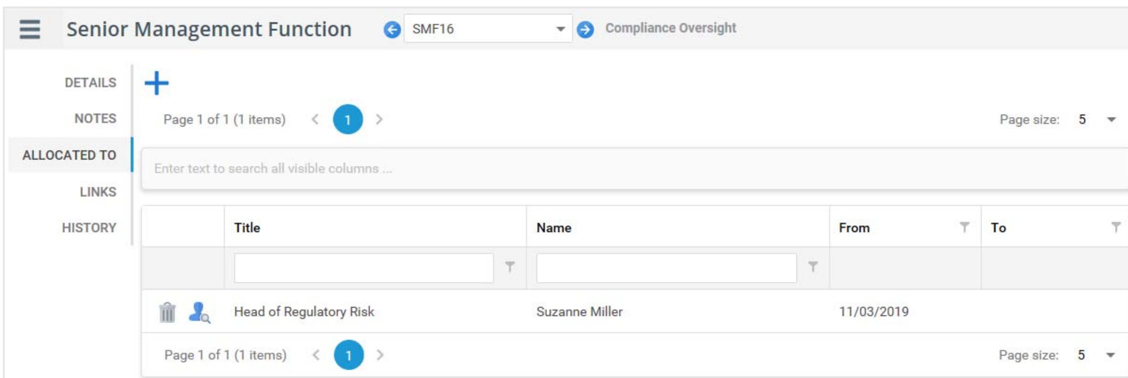


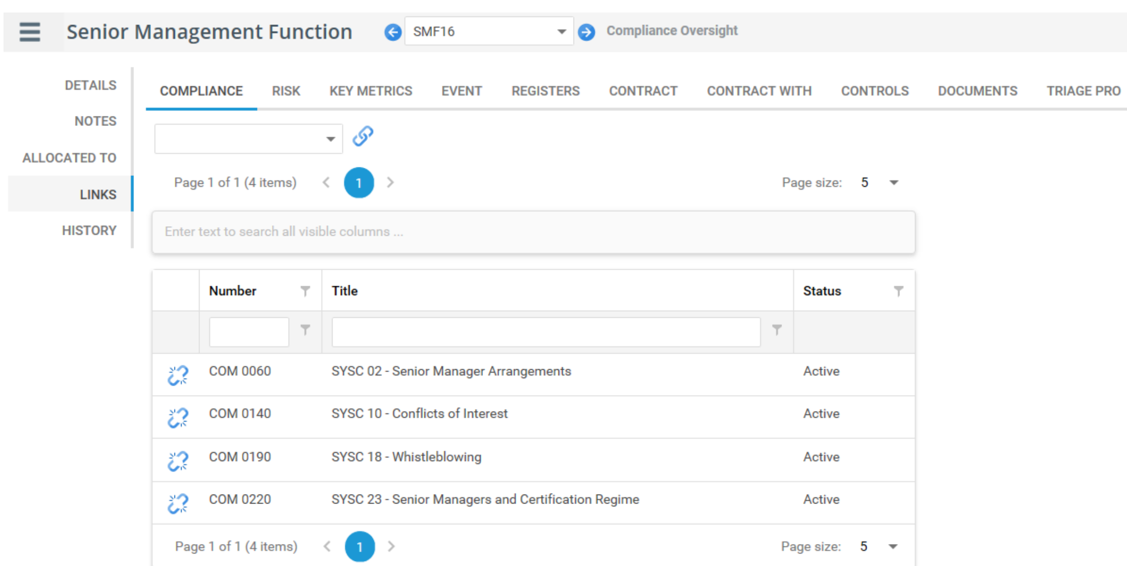


Functions and Responsibilities

Record the necessary information and links.



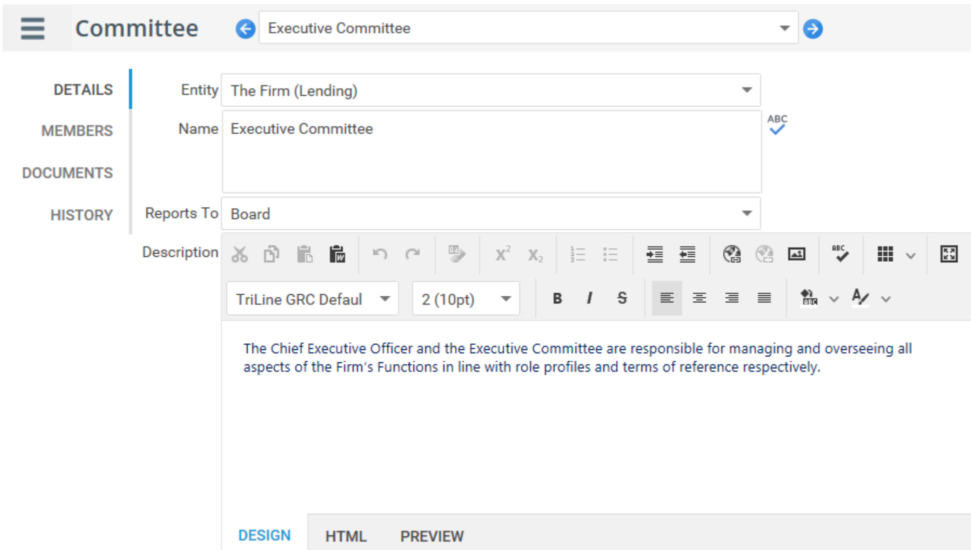


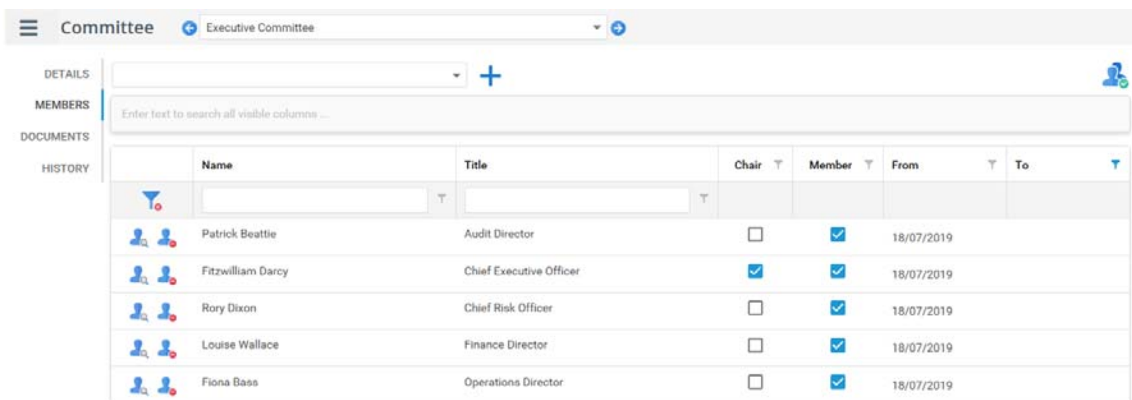


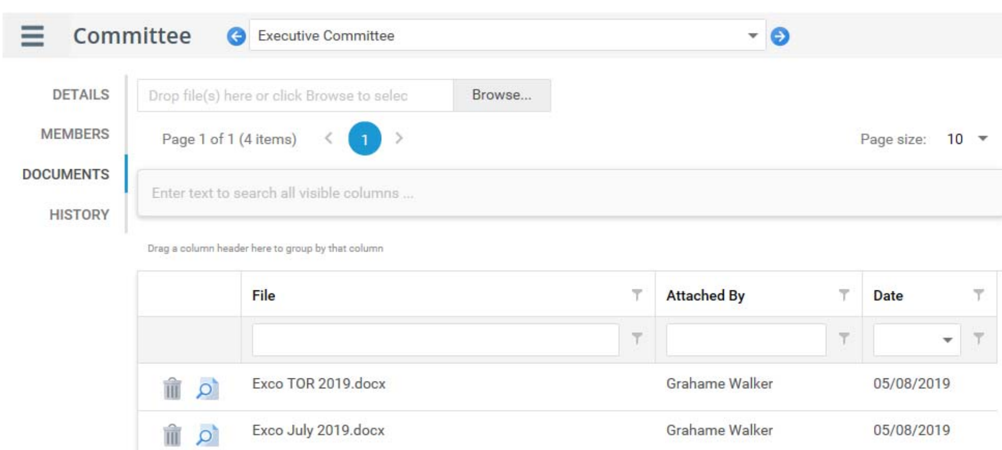
Committees

For each committee you can:

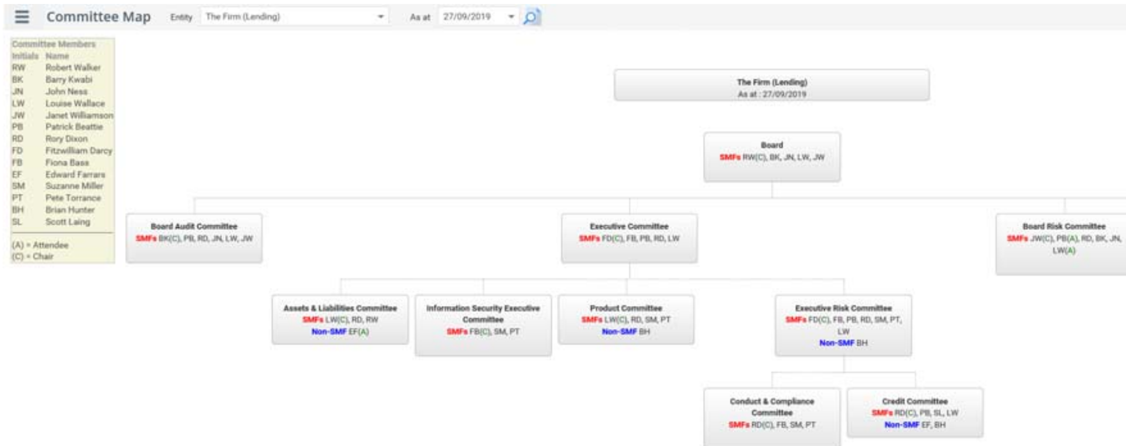
- record the details of the committee
- current and previous members
- upload documents (e.g. minutes of meeting).







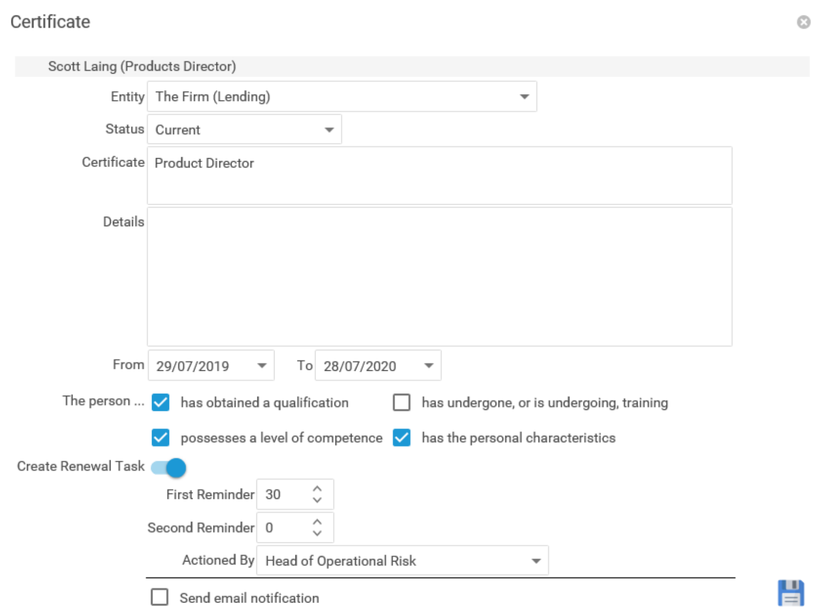
The committee map includes all members and highlights those with an SMF allocation.



Certificates

Certificates are issued to individuals within the organisation. Some of the features include:

- set the start and end dates of the certificate validity
- define the rationale for the certificate being issued
- optionally, generate a task to renew the certificate
- optionally, send a notification email to the certificate holder when the certificate is issued, renewed or terminated early.



The certificate Gantt chart shows current certificates and the renewal period.